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THE OFFICE OF FINANCE PILOT PROJECT
MANAGERIAL GRID
(January-June 1965)

1. In September 1965, the Office of Finance will begin Phase II of its Pilot Project in the Managerial Grid. This paper, which is for information only, documents the Pilot Project to date. Hopefully, it will be useful in planning similar projects in the future.

2. Senior Seminars in the Managerial Grid (Phase I) were held in May 1964 and October 1964 for Agency managers at the GS-15 through GS-18 level. Following these the Executive Director and the Deputy Director for Support approved, in January 1965, a proposal that a Pilot Project be undertaken to test and evaluate the second phase of the Grid Program.

3. This undertaking would require the selection and designation of a particular entity within the organization - one of appropriate size - which would be in a position to expose all of its managers and supervisors to the one-week Grid Laboratory-Seminar (Phase I) in the shortest possible time. Another criterion for selection was that the Chief and Deputy of the selected component had already taken Phase I of the program and were favorably disposed toward the Grid approach.

4. In subsequent discussions, which included representatives of Leadership Development Associates, it was agreed that the Office of Finance would be a suitable component with which to begin. Accordingly, this office was so designated by the Deputy Director for Support and plans for initiation of the project began to be formulated. These plans included:

a. Scheduling:

In discussions with the Director of Finance and his staff it was agreed that his [] managers and supervisors would attend Seminars in three groups; that the three Seminars would be given over "long" weekends (i.e., from Thursday afternoon until Monday afternoon); that the O/Fin Training Officer would be the general coordinator of arrangements for O/Fin; and that the Director of Finance and/or his deputy would be present at the kick-off of each of the Seminars. Dates agreed upon for the three sessions were:

4-8 March 1965
18-22 March 1965
1-5 April 1965

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b. Site:

Through the Office of the Director of Communications and administrative personnel at [] arrangements were completed to use [] for the periods listed above. Special arrangements were required to provide cafeteria service over the weekends.

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c. Funding:

An understanding was reached that the expense of the Pilot Project (estimated not to be in excess of \$25,000 for Phases I and II) would be borne by the Office of Finance.

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d. []

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(1) Agreement was arrived at with [] whereby one consultant would be present to conduct each Seminar, assisted as necessary by the Management Training Faculty, OTR.

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(2) 75 sets of Grid materials, including texts, were to be provided [] and billed, ultimately, to O/Fin for the project. These would be supplemented by approximately 10 sets from MTF stock.

(3) Financial arrangements were to be handled by means of a basic contract (Agency - [] for the Pilot Project with a terminal (renewable) date of 30 June 1965. Individual items to be billed by [] and paid on a Task Order basis.

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e. Materials and Procedures

It was agreed that all participants in the Pilot Project would be issued Set I materials at the same time, regardless of which Seminar they would attend. Set II materials were to be issued upon receipt of completed Set I answer sheets. Issuance of Set I materials would be handled by the O/Fin project coordinator on a number, rather than a name, basis. Set I answers would be returned directly to MTF/IS/TR by the individuals concerned for scoring and statistical compilation.

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5. The Phase I portion of the program proceeded essentially according to the plans set forth in paragraph 3 above:

a. Number of Participants:

A total of ☐ O/Fin personnel ranging in grade from GS-16 to GS-6 attended the three sessions (five enrollees were lost through illness or conflicting requirements). The breakdown by grade for the three groups was as follows:

<u>Grade</u>	<u>Group I</u>	<u>Group II</u>	<u>Group III</u>
GS-6			
GS-7			
GS-8			
GS-9			
GS-10			
GS-11	25X1A		25X1A
GS-12			
GS-13			
GS-14			
GS-15			
GS-16			
No. Female	4	3	12

Note: Four of the participants in the first group were non-Finance personnel (three represented BPAM and one OTR).

b. Performance:

On scored exercises these three groups performed exceptionally well. In fact, on at least two of the exercises the average scores were well above the averages for Agency Senior Seminars, and the Industrial Norms compiled by Scientific Methods, Inc. Similarly, in the development of team skills, and in showing a continuing increase in team effectiveness over the training period, the O/Fin groups performed significantly.

In one exercise - the so-called Blue Booklet - in which both individuals and teams are asked to take a critical look at their own organization, some interesting results were obtained. Certain general

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problem areas were identified with some consistency and these will serve as apt subjects for examination during the course of Phase II.

Since the third group (see above) was made up principally of GS-6 through GS-11 participants this would indicate some support for [] contention that the Grid applies in solving problems as well at the bottom where concrete supervisory skills are required as at the top where executive decision-making involving complex judgments is demanded.

c. Conduct of the Program

[]
of Finance and his Deputy were present for the opening session and Mr. Fuchs gave the program an excellent send-off with his introductory remarks,

For the second and third groups [] represented [] opened the sessions and monitored proceedings on behalf of the Office of Finance.

The participative role of the Management Training Faculty instructors increased with each session.

6. General Observations by the OTR Management Training Faculty

The presence of Mr. Fuchs and [] and the tenor of their introductory remarks provided an obvious boost to the interest and enthusiasm of the participants. There appeared to be a general feeling that "if the bosses are sufficiently interested in this to give up their time, too, I'm all for it."

MTF was impressed by the diligence and serious effort displayed by each of the three groups. This is all the more significant when it is realized that the three groups contributed approximately 166 man-days of their own time to participate in the program - and we have yet to hear an individual complaint. This attitude, we feel, augurs well for the success of Phase II of the program. In retrospect, however, there is

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room to question the actual saving to the Agency in conducting this type of program over "long" weekends. The Seminar, in a five-day setting, is demanding and exhausting with morning, afternoon and evening sessions. Compressing the schedule to four days requires even more on the part of the participants and it is likely that most do not return to full productivity on the job until two days after the session is complete. Further, we feel there may be a loss in effectiveness of the program by acceleration of the normal five-day schedule. While we feel it was a successful experiment we probably would not recommend following this procedure in the future.

An ideal solution to the problem would be to have several Pilot Projects running concurrently so that the fewer participants from each component would be taken off the job in any given week.

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Having the sessions over weekends also put something of a strain on

are normally closed on Saturday and Sunday. This factor should be considered in future planning.

7. Phase II

The second phase is now firmly scheduled to begin, subject to DDS concurrence, on 25 September. So many scheduling conflicts were encountered that it proved impractical to initiate the second phase any earlier. This first Phase II group will begin with the Director and Deputy Director of Finance and their Division and Staff Chiefs; i.e., the actual management team. Subsequently, training in this type of linkage will proceed down through the organization with each supervisor training with his team of subordinate supervisors.